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CON9640- Increased Agility Enabled by Rapid Adoption of Siebel Innovation Packs

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Presenters



Aashish Mahodaya
Supervisor, CRM Technology

Insperity

Agenda

- 1 Uptake Siebel Innovation Packs
- 2 Customer Case Study: Insperity
- 3 Customer Case Study: Barclays
- 4 Customer Case Studies: Ponder ProServe



Uptake Siebel Innovation Packs

Anil Billapati
Director, Siebel CRM Development

Incremental Repository Merge

Faster, Agile and Lower TCO

- Agility with uptake of Siebel Innovation Packs with incremental upgrade
 - ✓ No big bang upgrades
 - ✓ Incremental, Agile, Faster uptakes of Innovation Packs
 - ✓ Integrated with Siebel Database Server Configuration Wizard
- Increased validations & automations
 - ✓ Automatic detection of customer's Siebel version and validation
 - ✓ Error handling and validation for user inputs
- Reports and Analysis
 - ✓ Reports included for seed data changes & repository changes
 - ✓ Reduces testing cost and go live timelines

Incremental Repository Merge - Enhancements

- IRM enhancements
 - ✓ Reduced complexity, addition of upgrade path support for IP2015
 - ✓ Support for adding content to Patchsets with optional uptake.
 - ✓ Enhancement to merge cloned objects (upgrade ancestor)
 - ✓ Performance improvements to Web Template Migration (Developer preview for Composer mode)
 - ✓ Performance improvements to reduce production upgrade time

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**OneVoice – Open UI Upgrade
Project ,
Increased Agility enabled by the
Rapid Adoption of Siebel Innovation
Packs**

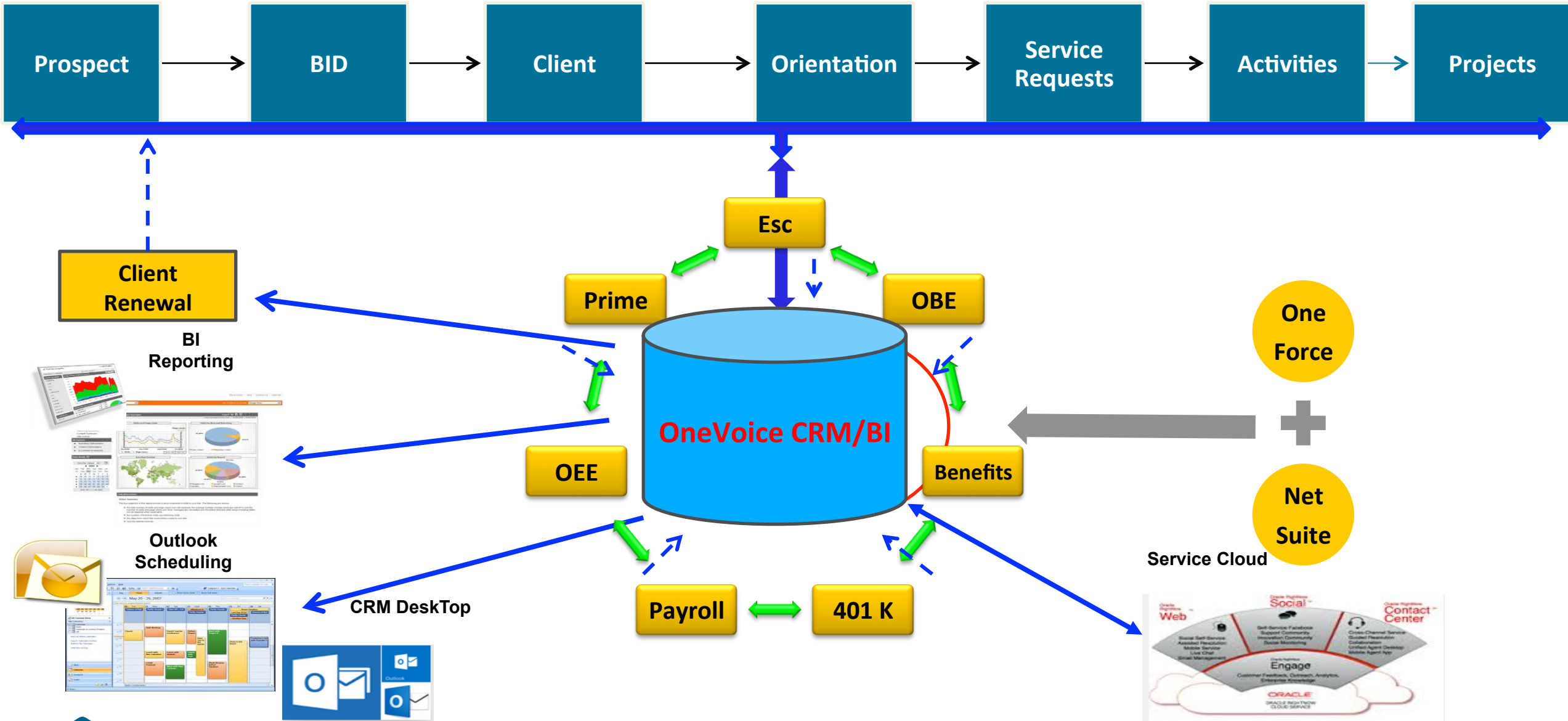
- Aashish Mahodaya

Insperity

OneVoice - Current CRM Application

- Insperity is currently running Siebel On Premise CRM version IP2014 (PS5)
 - For approximately 1,400 users
 - Core Siebel modules include CRM Base, Call Center, Email Response, and Field Service
- Insperity is currently running OBIA 7.9.6.4 and OBIEE 11.1.1.7
- Insperity's initial plan was to upgrade Siebel 8.1.1.7 to 8.1.1.11/ IP2013 (Open UI)
- Insperity chose to early adopt IP2014 (PS5)
- Completed upgrade from Siebel 8.1.1.7 to IP2014 (PS5) in June '15

Case Study - OneVoice (CRM/BI Process Flow)



OneVoice IP 2014 Upgrade

- Initial upgrade decisions
 - Insperity OV from Siebel 8.1.1.7 to 8.1.1.11 /Open UI
 - Insperity OV from Siebel 8.1.1.7 to IP 2013 or IP 2014
 - New environment or in-place
- In-place Upgrade
 - Never been tried for our upgrade path
- OUI vs HI expectations
- Dual URL's (Earlier plans for Dispatch Board/SSSE)
- PS 3 → PS4 → PS5 (Dispatch Board fix, Drag-Drop, & other issues)
- Decision to go with IP2014 PS5

Incremental Upgrade - Benefits

- IRM – In place upgrade, smaller / faster than full upgrade
- Completed IRM's in Pre-Prod (DEV & TEST) environment
 - Started with IP2013, moved to IP2014 for dev
 - Production directly to IP2014 PS5
- Usage of Parallel development during the upgrade process
- Customizations preserved, lesser conflicts, faster go live
 - Critical conflicts very limited, mostly with BIP
- No big bang upgrade, incremental upgrade was quick
 - Dev upgrade using IRM completed in less than 2 days (end to end)

Overall Upgrade Process/Challenges

Challenges

- Dispatch Board Performance
- Iterations with UI theme/redesign
- UI Performance
- Custom File Import Process
- Embedding Analytics/i-Help changed
- DLLs/ files mismatch issue

Considerations

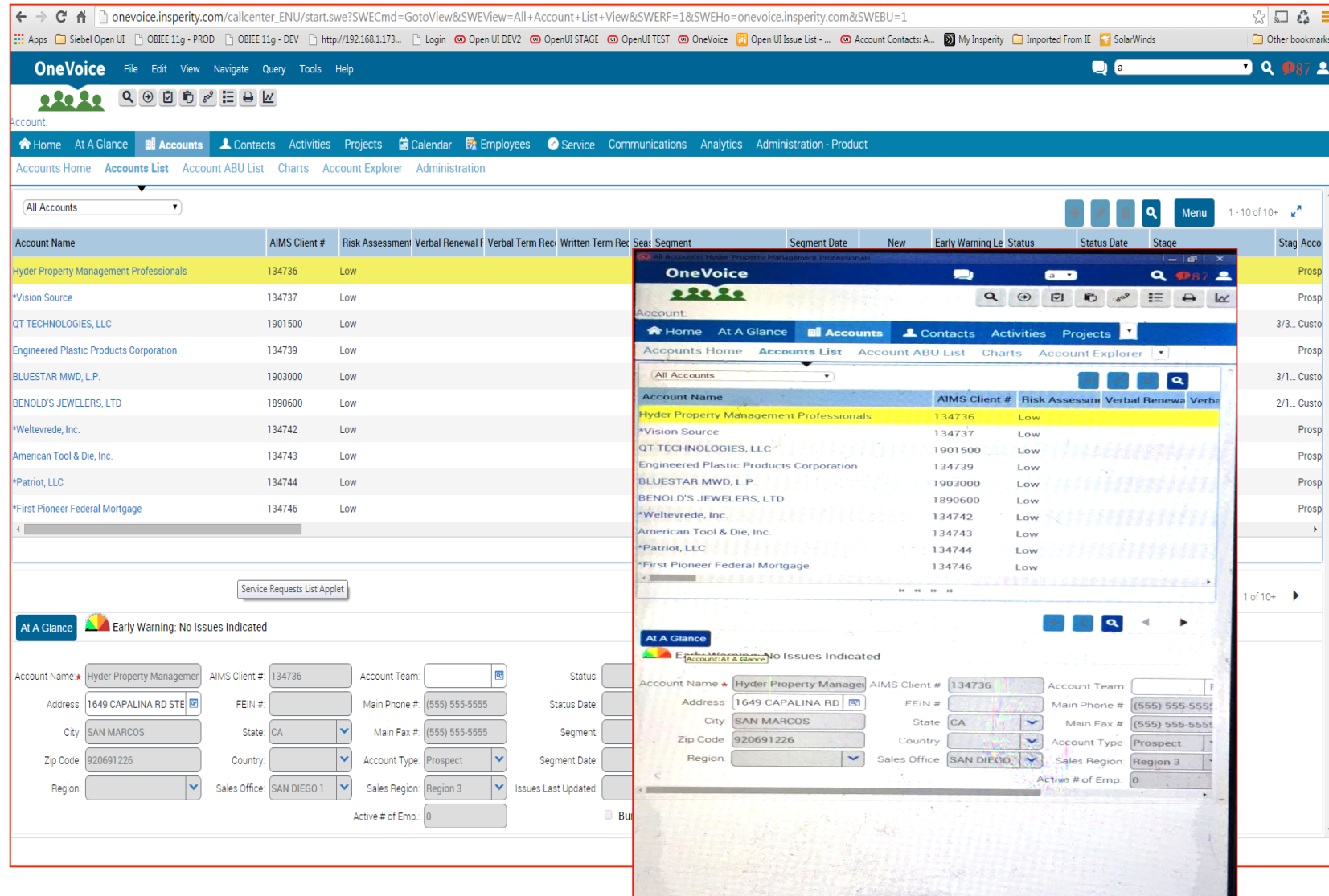
- Load/Stress testing in Pre-Prod
- Back end tuning, performance improvements
 - New indexes/ Denormalization
 - New configuration changes
 - Custom visibility changes
- Insperity custom themes
- Business Service /Browser Script Changes
- Symbolic URL embedding
- Parallel Development

Insperity Advantages

- Open UI /Patch Set Advantages
 - New Modern Look and Feel (Insperity themes)
 - Personalized Application
 - User Adoption
 - Multiple Device Support
 - Browser Independence
 - Productivity Improvement
 - Faster, Lower Cost Development
 - Dispatch board fix/improvements
 - List/Form Applet performance improvements
- Open UI Upgrade Vs Earlier Upgrade
 - Time
 - Cost
 - Resources
 - Development Effort
 - Parallel development

Responsive Web Design in OneVoice Application (Web/Mobile)

- Single Open UI framework for both Touch and Non-Touch devices
- Responsive applications that adjusts to Screen Form Factors and Device Capabilities
- New UI theme - Responsive and modern
- Web Templates – adds new easy to use templates with modern design
- JavaScript API - New API to allow open extension of functionality



Insperty Open UI Project Plan

Task ID	Task Name	Duration	Start	Finish	Resource Names	Comment	Oct 5, '14							Oct 26, '14			Nov 16, '14		Dec 7, '14			Dec 28, '14			Jan 18, '15		Feb 8, '15							
							F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S				
1	Open UI Training	1 day	Fri 10/10/14	Fri 10/10/14	OV Team , PPS Team	Optional, We can schedule it in between project days	OV Team ,PPS Team																											
2	Dev technical IRM upgrade in PPS lab	10 days	Mon 10/13/14	Fri 10/24/14	PPS Team, OV Team	Some work would be remote, Some parallel work possible	PPS Team,OV Team																											
3	Installation of Insperty dev environment	5 days	Mon 10/27/14	Fri 10/31/14	OV Team , PPS Team	Upgrade Work, Environment Set up etc.	OV Team ,PPS Team																											
4	Insperty test install	2 days	Mon 11/3/14	Tue 11/4/14	OV Team , PPS Team	Upgrade Work, Environment Set up etc.	OV Team ,PPS Team																											
5	IRM Test upgrade	3 days	Wed 11/5/14	Fri 11/7/14	OV Team , PPS Team	Upgrade Work, Environment Set up etc.	OV Team ,PPS Team																											
6	PPS support during testing phase	25 days	Mon 10/27/14	Tue 12/2/14	OV Team , PPS Team,QA	Some parallel work depending upon Open UI Issues/Outcome	OV Team ,PPS Team,QA Team																											
7	OV Team Open UI Training (ORACLE, VIRTUAL TRG)	5 days	Mon 11/10/14	Fri 11/14/14	OV Team	OV Team would be attending Oracle Virtual Training this week , Testing/ support from Ponder possible	OV Team																											
8	Production go-live support	8 days	Mon 12/8/14	Wed 12/17/14	OV Team , PPS Team, QA Team	We can plan GO Live before Thanks giving weekend, depending upon Testing /issues (else in December 1st week)	OV Team ,PPS Team,QA Team																											
9	Post Go Live Mandatory Enhancement/Fix	28 days	Fri 12/5/14	Thu 1/15/15	OV Team , PPS Team,QA	Some parallel work depending upon Open UI Issues/Outcome	OV Team ,PPS Team,																											
10	Performance tuning	7 days	Mon 12/8/14	Tue 12/16/14	OV Team , PPS Team	Optional, We can schedule it later in January onwards	OV Team ,PPS Team																											

Thank You !!!
Aashish Mahodaya



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